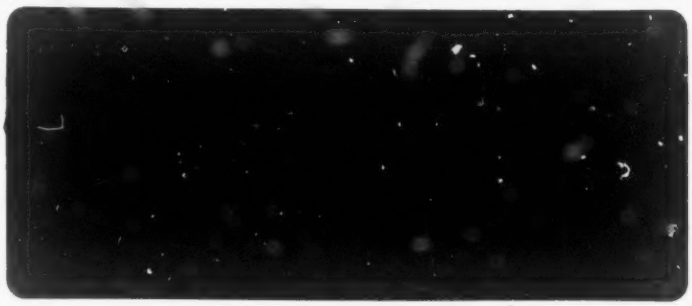
Research Report



Newspaper Readership Project

Newspaper Advertising Bureau, Inc. 485 Lexington Avenue, New York, New York 10017

CIRCULATION AND HOME DELIVERY

PATTERNS

This study is one of a series of research studies conducted under the auspices of the Newspaper Readership Project, an industry-wide effort to promote circulation and readership.

November 1983

NATIONAL STUDY OF THE DAILY NEWSPAPER AND ITS AUDIENCES

PREFACE

In May 1982, the Newspaper Advertising Bureau designed and carried out a nationwide survey of the readership of daily newspapers. The field work was conducted by Audits & Surveys, Inc. with a probability sample of adults in 1,979 households. The questionnaires used in the interview covered a wide range of topics: newspaper reading, television viewing, exposure to news media, readers' content preferences, ratings of the performance of the daily paper, circulation patterns, and detailed demographic information.

As part of the interview, newspaper readers were also taken through a copy of the paper they read yesterday, or the one they usually read, and asked about their readership of or interest in specific editorial and advertising items on sampled pages in that paper. These items were coded in several ways: size, use of text or illustrations, location in the paper, etc.

The results of this survey are presented in a series of detailed reports dealing with circulation issues, news habits of the American public, page traffic and ad readership, attitudes about the performance of the daily press, and the content and readership of news and features. A separate technical report on the survey, prepared by Audits & Surveys, Inc., that contains copies of the questionnaires used in the study, is also available.

This report was written by Thelma Anderson.

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INTRODUCTION

The 1977 national study, How The Public Gets Its News, demonstrated that the daily newspaper's impressive reach on an average weekday largely depends on home delivery. Most frequent readers have home delivery, but most infrequent readers do not. With the decline in retail outlets, and with the increase in problems in home delivery, there has been a growing concern in the industry with how to build subscription levels and how to maximize street sales.

Some research on single copy sales has tracked daily fluctuations, testing particular sales tactics and front page differences. Other studies have surveyed single copy buyers. These have suggested that except when there is a special news event, single copy buying follows habitual patterns. In 1981 a three-city study of single copy buying was conducted by the NAB for the Newspaper Readership Project. This confirmed that buying papers on selected days is related to special sections or features, sometimes as the only paper read and sometimes to supplement the home-delivered paper. But it also found that frequent readers are more likely to turn to single copy buying because of home delivery problems, and that newspaper drives for subscriptions were less intense in non-competitive markets.

The present study examined, on a national basis, two subjects of concern to circulation people: home delivery and single copy buying. The report which follows provides an analysis of subscribers and single copy buyers, and highlights differences by publishing cycle and market size.

The section on home delivery includes a description of the carriers, satisfaction with home delivery, previous experience with home delivery, and the extent to which readers have been solicited for home delivery. The section on single copy buying reports the frequency of such buying, the availability of outlets, and the kinds of places at which newspaper readers prefer to buy single copies.

This report of behavior and attitudes toward home delivery and single copy buying presents a broad national picture. But demographic and distribution factors affecting home delivery and street sales vary from city to city, and for different papers within each city. As with all national studies, the findings in this report will provide useful insights for all newspapers, but the findings may not be directly applicable to a specific newspaper or market.

HIGHLIGHTS

Importance of Home Delivery: Home delivery is clearly the cornerstone of regular newspaper reading. Whereas 87% of those who have home delivery read a paper yesterday, only 52% of non-subscribing newspaper readers did so. Home delivery also develops the newspaper reading habit in children. Children were reported to have read a newspaper yesterday in 37% of subscribing households but in only 21% of non-subscribing households.

Incidence of Home Delivery: Nine out of ten adults read a daily newspaper at least some of the time, and 71% of this reading public has home delivery. 63% have weekday delivery and 60% have a Sunday paper delivered. Most subscribers (72%) receive both daily and Sunday newspapers.

Home delivery of a daily newspaper is highest in the suburbs (61%) and in non-metropolitan areas (60%) and lowest in central cities (47%). It is highest in high income and education brackets, among adults over 45, married people, home owners and long-time residents. It is low among blacks, low income people, the unmarried, people under 30, and those who live in high-rise apartments.

Sunday home delivery is more uniform. Whereas older readers, married people and long-time residents have a higher dedication to their daily paper, their opposite numbers--the young, unmarried, newcomers--are just as likely to have Sunday as daily home delivery. It is only among blacks, a large proportion of whom buy single copies of the daily paper, that Sunday subscription, though low, is more widespread than daily subscription.

Although morning circulation outstrips the circulation of afternoon papers, afternoon papers were favored by a close margin over-all for home delivery. (30% report morning delivery and 32% have afternoon delivery.) In part this is due to the fact that home delivery is more prevalent in smaller metropolitan areas, where afternoon papers predominate. In larger markets (1 million or more), where morning papers predominate, morning papers are favored for home delivery. Single copy buying follows the same pattern. That is, single copy sales make up a larger proportion of the circulation of morning papers in larger cities and of afternoon papers in smaller cities and non-metropolitan areas.

Carriers: Adult carriers are used most often in non-metropolitan areas. Juvenile carriers are used most often in the suburbs, and for afternoon deliveries. Having an adult or juvenile carrier makes no difference in satisfaction with delivery service. It is noteworthy that quite a few don't know their carrier, especially if he or she delivers a morning paper (16%).

Satisfaction with Home Delivery: Most subscribers are very satisfied with their weekday delivery service. Non-metro residents, who are more likely than others to receive their papers by mail, are somewhat less satisfied than other subscribers. So, too, are subscribers who work full time.

But about one in five subscribers have cancelled their subscription at some time because of poor delivery service. And service problems are the major reasons cited by frequent readers who are non-subscribers. It is the infrequent reader--who, to be sure, predominates among non-subscribers--who cites lack of interest or not having time to read as the reason for not subscribing.

Service problems were mentioned most often by city residents, by those in the Northeast, by blacks, and by long-time residents. And service failure was the primary reason for not subscribing among high income families.

Marketing Home Delivery: 45% of the non-subscribers have not been asked to subscribe to a daily newspaper at their present address. Those who have been neglected tend to be the people who are less likely to subscribe: people under 30, the less affluent and less well-educated, newer residents, and people in the Northeast. An earlier three-city study of single copy buying also indicated that there was less soliciting of subscriptions in non-competitive markets. To some extent, then, it is apparently lethargy as well as a judgment about promising targets which limits the amount of soliciting that is conducted in person, by mail, or by phone.

Single Copy Buying: Although nine out of ten adults say there are convenient places where they can buy single copies, only 39% ever do so. These are 71% of the non-subscribers, but also 20% of those who have home delivery.

Only one-fifth of those who buy single copies do so every day. 13% buy a paper almost every day, 21% buy a paper two or three or four times a week. But 26% buy only once a week and 19% do so less often. Even among non-subscribers, who buy single copies more often than subscribers, only 22% buy a paper every day.

Among yesterday readers, the proportion who bought their papers varies from day to day. Confirming what circulation people know, it was lowest on Mondays and highest on Wednesdays and Fridays.

Bought Copies Taken Home: 84% of the single copy buyers said they usually take home the papers they buy. This confirms findings in studies of individual newspapers.

Machines vs. Retail Outlets: Stores or newsstands are greatly preferred over coin-operated machines or racks in all segments of the population and by those who buy papers frequently as well as those who buy infrequently. They are most highly preferred in the Northeast, where single copy buying is concentrated, and where retail outlets still prevail. The earlier three-city study revealed that one of the reasons retail outlets are preferred is that they provide better newspaper service as well as more variety, choice and "appetite appeal." This suggests that every effort should be made to provide retail outlets. And with the decline of such outlets, it becomes increasingly important to improve and expand home delivery.

DETAILED FINDINGS

Home Delivery and Newspaper Readership

There is a strong relationship between home delivery and regular newspaper reading. Whereas almost nine out of ten adults who have home delivery read a newspaper yesterday, only half who do not have home delivery did so. A similar relation obtains for Sunday newspaper reading: among those who have home delivery, 82% read four or more issues in the past four weeks, compared with only 35% of those who do not have the Sunday paper home delivered.

Table 1

Newspaper Readership by Presence of Home Delivered Papers[a]

	Have home delivery	No home delivery
Weekday readership by weekday home delivery:		
Read yesterday	87%	52%
Did not	13	48
	100%	100%
Sunday readership by Sunday home delivery:		
Read 4 or more issues, past 4 weeks	82%	35%
Read 1-3 issues	15	29
Read none	3	36
	100%	100%

[a]Unless otherwise noted, the tables shown throughout this report do not include the 10% who said they never read a daily or Sunday newspaper. Assuming that most of them do not have home delivery, if they were included in table 1 the readership figures for those who do not have home delivery would be even lower. The bases for the total sample and newspaper readers are shown in the Appendix.

Home delivery is also important for developing the newspaper reading habit in children. Respondents were asked how many children in the household under the age of 18 read or looked at a newspaper yesterday. Children were reported to have read a newspaper yesterday in 37% of subscribing households, but in only 21% of non-subscribing households.[1]

Table 2

Newspaper Readership by Children in Subscribing and Non-Subscribing Households

	Have home delivery	No home delivery
Children read yesterday	37%	21%
Did not	55	70
Don't know, no answer	8	9
	100%	100%

Although this is based on the adults' reports, it is consistent with what children themselves reported in the study of "America's Children and the Mass Media"--that those with regular access to a newspaper at home are better newspaper readers.[2]

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[1] A validation study of the primary respondent's report of newspaper reading by other adults in the households in the present study found agreement in five out of six cases. Among the remainder, under-reporting of actual reading by others exceeded over-reporting. This finding confirms the reliability of reports by adult witnesses to the reading habits of others in the household.

[2] See Children and Newspapers, Newspaper Readership Project, Newspaper Advertising Bureau, 1980.

The Prevalence of Home Delivery

Newspapers are read by 90% of the adult population, and 71% of these readers have home delivery. 63% have home delivery of a daily newspaper and 60% have home delivery of a Sunday newspaper; in the total adult population these figures are 57% and 54% respectively.

Most people who subscribe receive both daily and Sunday newspapers (72%). Of the remainder, 16% receive only a weekday paper and 12% receive only a Sunday newspaper by home delivery.

Table 3

Weekday and Sunday Home Delivery

	Total Sample		Total Readers		Total Subscribers
TOTAL WEEKDAY DELIVERY	57%		63%		88%
TOTAL SUNDAY DELIVERY	54%		60%		84%
Weekday and Sunday	46%	63%	51%	71%	72%
Weekday only	11		12		16
Sunday only	8		8		12
Neither, no answer	35[a]		29		--

[a]Includes newspaper non-readers, (10% of all adults), who were not asked about home delivery in 1982.

When compared with the 1967 figures on home delivery obtained in the national study, "How the Public Gets Its News," there has been a small drop in the proportion who have any home delivery--from 88% to 85%. However, although weekday and Sunday home delivery have both dropped overall, there has been more of a decline in weekday delivery (from 64% to 57%) than in Sunday home delivery (from 61% to 54%). Moreover there has

been a doubling of those with Sunday delivery only, from 4% to 8%. These changes parallel the trend in Sunday vs. daily circulation figures: whereas daily circulation has risen by roughly 2% since 1977, Sunday circulation has risen by 7%.[1]

Table 4

Comparison with Home Delivery in 1977[a]

	1982	1977[b]
Weekday and Sunday delivery	46%	52%
Weekday only	11	12
Sunday only	8	4
Neither, no answer	35	32
	100%	100%

Base = Total Sample

[a]Comparison with the 1977 study is limited by differences in questions asked: In 1977 all respondents were asked about home delivery, but in 1982 it was not asked of those who never read newspapers. It is assumed in this table that they do not have home delivery.

[b]Source: The Home Delivery Population: Characteristics and Readership Patterns, Newspaper Readership Project, Newspaper Advertising Bureau, 1978.

[1]

	1982	1977
Total Daily Circ. (000)	62,487	61,495
Total Sunday Circ. (000)	56,761	52,659

Source: Editor and Publisher International Yearbook. Prepared by Newspaper Advertising Bureau, July 1983.

Who Subscribes to Newspapers?

Home delivery is widespread among most segments of the population (table 5). The proportion with home delivery of a daily newspaper is particularly high among those in the highest income and education brackets, among adults over 45, married people, those who own their own homes, and long-time residents.

There are, however, several demographic groups in which daily home delivery falls below the 50% mark: blacks, those with family incomes under $10,000, the unmarried, renters, and those who are under 30.

Sunday home delivery is more uniform. Differences are somewhat smaller between younger and older readers, between blacks and whites, between married and unmarried, and between newcomers and longer residents than is the case for dailies.

To look at it differently, comparing the incidence of Sunday and weekday home delivery within each group helps to identify the groups with greater dedication to their daily papers. Thus, older readers are more likely to have daily than Sunday delivery, but this is not so for the younger ones. Similarly there is somewhat more weekday than Sunday home delivery among married people, but not the unmarried, and among long-term residents, not newcomers. It is only among the black population that Sunday subscription, though low, exceeds daily subscription. As will be seen later, a very large proportion of blacks buy their daily papers as single copies. Black newspaper readers tend to be central city residents; a higher proportion of sales of papers in larger central cities is accounted for by single-copy buyers.

Table 5

Home Delivery of Newspapers by Demographic Characteristics

	Total Sample[a]		Total Readers	
	Weekday Delivery %	Sunday Delivery %	Weekday Delivery %	Sunday Delivery %
TOTAL	57	54	63	60
18-24	42	41	48	48
25-29	42	45	48	52
30-34	52	50	58	55
35-44	58	57	63	61
45-54	69	66	77	74
55-64	67	59	72	63
65+	67	58	75	65
Men	54	54	62	61
Women	59	53	64	58
College grad.	65	65	68	68
Some college	60	61	65	66
H.S. grad.	55	51	61	56
Less than h.s. grad.	49	42	60	52
$35,000 and over	71	71	74	74
$25,000-$34,999	64	61	68	65
$15,000-$24,999	58	54	64	59
$10,000-$14,999	49	49	56	56
Under $10,000	37	33	44	40
White	61	56	66	61
Black	29	39	36	49
Total Employed	55	54	61	60
Full time	55	54	61	60
Part time	55	55	60	60
Not employed	59	53	65	59
Homemaker	59	49	66	55
Married	64	59	70	64
Formerly married	46	46	54	53
Never married	42	44	49	50
Children 17 or under	55	52	61	58
No children present	58	55	65	61
5 years or more	61	57	68	62
4 years or less	39	43	45	49
Own home	68	62	74	68
Rent home	28	32	34	38

[a]Bases include newspaper non-readers, who were not asked about home delivery.

Home Delivery of Newspapers by Market Characteristics

Home delivery of daily newspapers is highest in the suburbs (61%), about as high in the non-metropolitan areas (60%), and lowest in central cities (47%). By city size, the big distinction is between cities of one million and over, and those which are smaller: in the largest cities only 48% have home delivery (table 6).

In regional terms, home delivery of daily newspapers is lowest in the Northeast (50%) and highest in the North Central states (60%) and the South (59%).

Weekday home delivery to different types of dwellings is generally predictable and is consistent with metro area and regional differences in home delivery. It is highest in separate single houses, which prevail in suburbs, appreciably lower in multi-family and attached row houses, and lowest of all in apartment houses. Indeed it is extremely rare in apartment houses with six floors or more. It is interesting that home delivery is more prevalent in mobile homes than in apartment houses. This reflects the fact that mobile homes--which are most prevalent in North Central states where home delivery is strong--now represent a different type of housing. They no longer imply a high degree of mobility, but rather a more easily financed way of obtaining relatively inexpensive permanent housing, although some mobile homes are elaborate than was the case in years past.

Although home delivery of the Sunday paper is somewhat lower overall (54% vs. 57% for the daily paper), this varies with some of the market characteristics we have discussed. Thus, home delivery of the Sunday paper is far less the rule in non-metropolitan areas, where there are fewer

Sunday papers: 60% have a weekday paper delivered, but only 41% have a Sunday paper delivered. The same is true in North Central states generally, where 60% have daily delivery and only 51% have Sunday delivery.

In the largest metropolitan areas--where single copy buying is heaviest--there is slightly less daily than Sunday home delivery. And for the metropolitan areas overall, this holds true in the suburbs as well as central cities.

Table 6

Home Delivery of Newspapers by Market Characteristics

	Total Sample[a]		Total Readers	
	Weekday Delivery %	Sunday Delivery %	Weekday Delivery %	Sunday Delivery %
TOTAL	57	54	63	60
Metro 1,000,000+	48	53	56	62
Metro 250,000-999,999	67	65	72	70
Metro 50,000-249,999	61	64	66	68
Metro central city	47	50	52	55
Metro suburbs	61	64	70	71
Non-metro	60	41	66	45
Northeast	50	50	53	53
North Central	60	51	66	55
South	59	59	67	66
West	55	53	65	62
Separate single house	63	59	69	65
2 or 3 family house	43	40	50	47
Row house	41	47	47	53
Apt., 5 floors or less	21	26	28	35
Apt., 6 floors or more	9	14	9	15
Mobile home	33	19	42	23

[a] Does not include newspaper non-readers, who were not asked about home delivery.

Morning vs. Afternoon Home Delivery

Although total morning circulation outstripped the circulation of afternoon daily newspapers in 1982,[1] the incidence of home delivery was slightly larger overall for afternoon papers than for morning papers: among the 63% of readers who had home delivery, 30% reported morning delivery and 32% reported afternoon delivery (table 7).[2]

In the largest cities (one million and over), home delivery of morning papers predominates, since these are the markets in which morning papers predominate. However, the ratio of morning to afternoon daily home delivery in big cities, shown in table 7 (33%:23%), is much closer than the ratio of a.m. to p.m. daily circulation in cities over 1,000,000 (4.2:1),[3] since single copy sales make up a sizeable proportion of their

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1 Daily Newspaper Circulation, 1982

Morning	33,174,087
Evening	29,313,090

Source: Editor & Publisher International Yearbook
(In these figures circulation of "all day" papers is equally divided between AMs and PMs.)

2 1% failed to indicate whether their paper was delivered before or after noon.

3 Based on 1982 figures reported in 1983 Editor and Publisher International Yearbook:

Net Paid Circulation, Sept. 1982 (in 000s)
(by Population Groups)

Population	Circulation AM	PM
More than 1,000,000	9,[illegible]	[illegible]
500,001 to 1,000,000	5,[illegible]	[illegible]
100,001 to 500,000	12,[illegible]	[illegible]
50,001 to 100,000	[illegible]	[illegible]
Less than 50,000	[illegible]	[illegible]

morning circulation. The balance in favor of afternoon delivery increases in successively smaller cities, as does actual circulation. But again the morning-to-evening ratio of home delivery differs from the circulation ratio. Thus, in population areas of under 50,000 (non-metro), where the circulation of evening papers is more than three times greater than that of morning papers, 38% have home delivery of an afternoon paper, compared with 26% for the morning paper. That is, in non-metropolitan areas single copy sales would appear to account for a sizeable proportion of total afternoon circulation.

Geographic variations reflect the city size composition of the regions. There is far more home delivery of morning papers in the West (40% vs. 25%) where the population is concentrated in urban areas. In the Northern states--eastern as well as central--there is somewhat more home delivery of the afternoon paper. Southern respondents indicated an even balance in home delivery.

Table 7

Home Delivery of A.M. and P.M. Newspapers
by Market Characteristics

	A.M. Delivery %	P.M. Delivery %
TOTAL	30	32
Metro 1,000,000+	33	23
Metro 250,000-999,999	33	38
Metro 50,000-249,999	29	36
Metro central city	27	25
Metro suburbs	36	33
Non-metro	26	38
Northeast	23	30
North Central	27	37
South	33	33
West	40	25
Separate single house	33	35
2 or 3 family house	23	28
Row house	27	19
Apt., 5 floors or less	16	12
Apt., 6 floors or more	-	2
Mobile home	21	21

Variations by population segments (table 8) are, of course, correlated with demographic variations with city size.[1] Thus home delivery of afternoon papers was particularly strong among 55-64 year-olds and those who were not high school graduates--groups more prevalent in smaller cities. Correspondingly, home delivery of morning papers was strong among the demographic segments more prevalent in large cities: high income households and college graduates. And although people under 30 and recent residents are less likely to have any home delivery of a daily newspaper, those who do are more likely to take a morning paper.

[1] See Daily Newspaper Audiences: An Analysis of Four Circulation Size Groups, Newspaper Readership Project, Newspaper Advertising Bureau, 1981.

Table 8

Home Delivery of A.M. and P.M. Newspapers
by Demographic Characteristics

	A.M. Delivery %	P.M. Delivery %
TOTAL	30	32
18-24	25	23
25-29	27	20
30-34	23	35
35-44	29	33
45-54	38	38
55-64	30	41
65+	38	36
Men	31	30
Women	30	34
College grad.	41	26
Some college	31	33
H.S. grad.	29	31
Less than h.s. grad.	24	35
$35,000 and over	42	31
$25,000-$34,999	32	36
$15,000-$24,999	31	33
$10,000-$14,999	26	29
Under $10,000	20	24
White	32	34
Black	20	16
Total Employed	29	31
Full time	29	31
Part time	28	30
Not employed	32	32
Homemaker	29	36
Married	33	37
Formerly married	27	26
Never married	26	22
Children 17 or under	30	31
No children present	31	33
5 years or more	32	35
4 years or less	26	18
Own home	32	35
Rent home	15	13

Previous Weekday Home Delivery

Non-subscribing newspaper readers were asked whether they had ever had home delivery of a daily newspaper. 60%--comprising 22% of all readers--said they had. Only 14% of the newspaper reading public said they had never had home delivery. (Table 9)

The incidence of lapsed subscribing is more uniform through the various segments of the population than is the incidence of never having had home delivery. For example, approximately one in five people at each educational level are lapsed subscribers, but whereas one in five (19%) on the lowest educational level has never had home delivery, this is true of only 9% of the college graduates. Similarly, although the proportion of lapsed subscribers is approximately the same among city residents and suburbanites, and among blacks and whites, city residents and blacks are three times more likely never to have had home delivery.

Since these segments in which people have had no previous home delivery are the segments in which current home delivery is also weakest, it can be inferred that some prior experience with home delivery is an important foundation for subscribing to a daily newspaper currently. These results also highlight the groups that offer the best opportunity for enlarging the base of daily newspaper subscribers.

Table 9

Current and Past Weekday Home Delivery

	Current Delivery %	Only in the Past %	Never Had %	No Answer %
TOTAL	63	22	14	1
18-24	48	28	22	2
25-29	48	25	23	4
30-34	58	29	11	1
35-44	63	25	11	1
45-54	77	15	8	*
55-64	72	20	7	1
65+	75	14	10	1
College grad.	68	23	9	-
Some college	65	21	13	1
H.S. grad.	61	24	13	2
Less than h.s. grad.	60	20	19	1
$35,000 and over	74	18	9	-
$25,000-$34,999	68	21	10	*
$15,000-$24,999	64	20	14	2
$10,000-$14,999	56	26	15	3
Under $10,000	44	32	22	2
White	66	22	11	1
Black	36	26	34	4
Metro central city	52	24	23	1
Metro suburbs	70	22	7	1
Non-metro	66	18	13	1
Northeast	53	17	26	4
North Central	66	22	12	*
South	67	24	8	1
West	65	25	10	*
Frequent readers	76	14	9	1
Infrequent readers	34	40	24	2

THE HOME DELIVERY EXPERIENCE

How Newspapers are Home Delivered

Most newspapers are of course carrier-delivered, but 4% receive their newspaper by mail and 2% receive newspapers both ways. Mail delivery is most frequent in non-metropolitan areas and in North Central states, where 12% receive at least one of their papers by mail.

Table 10

How Newspapers are Delivered

	Carrier %	Mail %	Both Ways %	N.A. %
Total readers who have home delivery	93	4	2	1
Metro central city	97	2	1	-
Metro suburbs	96	1	1	2
Non-metro	86	9	3	2
Northeast	97	1	1	1
North Central	85	9	3	3
South	96	2	1	1
West	96	2	2	-

Half the readers who have home delivery report that their carrier is a juvenile, 35% say he or she is an adult and 10% don't know the carrier's age (because the reader is not necessarily the individual who pays or deals with the carrier). Those who have a morning paper home-delivered are, understandably, far less likely to know who their carrier is (16% vs. 5% for subscribers to p.m. papers). They also report fewer juvenile carriers than afternoon subscribers do. This too is understandable, since

after-school paper routes are more convenient for juvenile carriers. Adult carriers predominate in non-metro areas, where distant routes require driving, and in the South (table 11).

Table 11

Juvenile vs. Adult Carriers

	Juvenile %	Adult %	D.K. age %	Mail %	N.A. %
Total with Home Delivery	50	35	10	4	1
Before noon	42	36	16	5	1
After noon	57	34	5	1	3
Metro central city	51	33	14	2	-
Metro suburbs	61	26	10	1	2
Non-metro	32	49	8	9	2
Northeast	78	16	4	1	1
North Central	60	24	3	9	4
South	27	54	16	2	1
West	49	34	14	2	1

Satisfaction with Present Weekday Delivery Service

Most subscribers are very satisfied with their weekday delivery service, whether their carrier is an adult or a juvenile. This is an important finding because of the increasing use of adult carriers with bigger routes.[1] Non-metro residents, who are more likely to receive their papers by mail, are slightly less satisfied. Also those who are employed full-time are marginally less often satisfied. But the high levels of satisfaction apply to both a.m. and p.m. newspaper subscribers (Table 12).

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[1] See Circulation Department Practices, Newspaper Readership Project, Newspaper Advertising Bureau, 1980.

Table 12

Satisfaction with Weekday Delivery Service

	Very %	Fairly Well %	Not %	D.K./ N.A. %
Among:				
Total who have home delivery	72	23	2	3
Juvenile carriers	72	23	3	2
Adult carriers	74	23	2	1
Don't know age	75	23	2	-
Mail	63	21	6	10
Metro central city	75	23	1	1
Metro suburbs	74	21	2	3
Non-metro	67	25	4	4
Employed full time	69	26	3	2
Employed part time	77	18	1	4
Not employed	73	22	2	3
A.M. paper subscribers	73	23	2	2
P.M. paper subscribers	72	23	3	2

Reasons for Not Subscribing

The reasons why people do not have home delivery were explored in several ways. First, non-subscribers were asked whether they had been asked to subscribe at their present address. Those who had been solicited were then asked why they had refused. And, finally, both subscribers and non-subscribers were asked whether they had ever cancelled specifically because of poor service.

Been asked to subscribe? As many as 45% of the non-subscribers have not been asked to subscribe to a daily newspaper either in person, by mail, or by phone, at their present address. In general, the incidence of

Table 13

Non-Subscribers: Have you been asked to subscribe at present address?

	Yes %	No %	N.A. %
TOTAL	54	45	1
18-24	43	57	*
25-29	45	55	*
30-34	54	43	3
35-44	64	31	5
45-54	60	39	1
55-64	66	31	3
65+	58	42	-
College grad.	65	34	1
Some college	55	43	2
H.S. grad.	54	45	1
Less than h.s. grad.	45	52	3
$35,000 and over	70	28	2
$25,000-$34,999	62	37	1
$15,000-$24,999	51	48	1
$10,000-$14,999	53	45	2
Under $10,000	39	58	3
Metro central city	46	54	-
Metro suburbs	76	21	3
Non-metro	34	63	3
5 years or more	57	41	2
4 years or less	46	53	1
Northeast	40	57	3
North Central	65	34	1
South	50	48	2
West	66	33	1
Frequent readers	50	48	2
Infrequent readers	57	42	1

soliciting parallels the incidence of newspaper subscribing. Thus there has been less individual soliciting among non-subscribing city dwellers, only 46% of whom have been asked, compared to 76% of suburban non-subscribers. (Non-metro residents--though more likely to be subscribers than city residents--are least likely to be sought out.) Others who have been neglected in subscription drives are people under 30, the less affluent and less well-educated, newer residents, and people in the Northeast. Whether deliberately or by default, the less promising prospects and those who are less easily serviced tend to be neglected.

Reasons for not subscribing last time asked: The 54% of the non-subscribers who said they had been asked to subscribe were then asked why they had decided not to (Table 14). One-third (34%) indicated a lack of interest in reading a newspaper, explicitly, or by implication in saying they had no time to read.[1] They included a small number (5%) who were not interested in reading that paper. Then there were 20% who spoke of the cost. It can be assumed that this reason is not unrelated to lack of interest, since the consumer would economize on low priority items.[2]

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[1] See Changes in the Frequency of Newspaper Reading: Who Changes and Why?, Newspaper Readership Project, Newspaper Advertising Bureau, 1980, for an analysis of time pressure and other reasons as cause of reduced reading frequency.

[2] In fact one-fourth of those who mentioned cost also indicated no interest. (Table not shown.)

Table 14

Reasons for Deciding Not to Subscribe Last Time Asked
(Base: Non-subscribers who have been solicited)

Lack of interest in paper (net)	34%
General lack of interest in reading a newspaper	14
No time to read	13
Not interested in that paper; only read that paper certain days	5
Other lack of interest mentions	5
Can't afford, cost reasons	20
Service problems (net)	22
Home delivery not dependable	13
Home delivery too late	3
Home delivery is sloppy	4
Paper gets lost or stolen	2
Other service problems	4
Prefer to buy (net)	14
Like buying paper on way to work/at work/ on way home	8
Rather buy at store/newsstand	4
Other prefer to buy mentions	3
Prefer to buy, unspec	3
Not always home (net)	4
Not at home to receive, away during day	1
Out of town a lot	1
Other not always at home mentions	2
Billing/Collecting problems (net)	3
Not at home when carrier comes to collect	1
Other problems	2
All other mentions	21
Total[a]	122%

[a]Total exceeds 100% because more than one category of answer was possible.

A second set of reasons had to do with what might be called the mode of delivery. A sizeable proportion (22%) of the group queried spoke of service problems, emphasizing in particular that home delivery is not dependable. And 14% said they preferred to buy their papers at a store or newsstand, or on their way to or from work, which may imply some dissatisfaction with home delivery. Although billing and collecting problems may be a nuisance, very few mentioned them as reasons for not subscribing.

The four primary categories or reasons are shown by demographic and readership characteristics in Table 15. As might be expected, lack of interest and cost reasons were given by infrequent readers and by low income people. They were far less likely to mention poor service or a preference for buying the paper.

It was reported earlier that those who currently subscribe are rather uniformly satisfied with their delivery service. Naturally, those who are sufficiently dissatisfied with delivery service would simply cancel it. The answers to the present question--though asked only of those who had been asked to subscribe--sheds light on what kinds of people have been lost to home delivery because of poor service. Among the non-subscribers who are frequent readers, one-third (35%) refused when solicited because of past service problems, and one in five (22%) said they preferred to buy their newspaper. Service problems were mentioned more often by city dwellers than by those who lived in suburbs or non-metro areas, by people in the Northeast, and by long-time residents. They comprised the primary reason for non-subscribing among high income families, who, like long-time residents, are more frequent readers and are most likely to have had subscriptions over a longer period of time in the past.

Table 15

Major Reasons for Not Subscribing by Background Characteristics of Non-Subscribers Who Have Been Solicited

	Percent who mention:			
	Lack of Interest	Cost Reasons	Service Problems	Prefer to Buy
	%	%	%	%
TOTAL (non-subscribers who have been solicited)	34	20	22	14
18-24	44	25	18	8
25-29	33	13	19	15
30-34	33	27	18	13
35-44	41	18	25	19
45-54	33	12	24	15
55-64	28	23	34	9
65+	15	21	16	15
$35,000 and over	22	6	37	18
$25,000-$34,999	39	18	31	22
$15,000-$24,999	27	16	20	13
$10,000-$14,999	43	30	13	4
Under $10,000	39	35	15	3
White	35	21	21	13
Black	27	14	32	17
Metro central city	33	19	31	9
Metro suburbs	37	18	17	16
Non-metro	29	27	17	17
5 years or more	32	18	24	15
4 years or less	41	27	15	10
Northeast	33	7	33	16
North Central	33	26	20	15
South	37	23	19	16
West	34	21	16	6
Frequent readers	18	14	35	22
Infrequent readers	45	24	12	8

Ever cancelled because of delivery service? When asked directly whether they had ever cancelled a daily paper subscription because they were dissatisfied with the delivery service, approximately one-fifth of current subscribers as well as non-subscribers said they had done so.

This has occurred somewhat more often among frequent readers and high income people--who are more likely to subscribe--but also among blacks and readers in larger metro areas. And cancellations were more common among those who are employed full time, and among subscribers to morning papers.

Table 16

Percent Who Have Ever Cancelled Because of Delivery Service

	%
TOTAL READERS	20
Frequent readers	22
Infrequent readers	17
Current subscribers	19
Non-subscribers	22
A.M. subscribers	22
P.M. subscribers	17
18-24	17
25-29	19
30-34	26
35-44	25
45-54	25
55-64	18
65+	15
$35,000 and over	26
$25,000-$34,999	23
$15,000-$24,999	20
$10,000-$14,999	17
Under $10,000	16
Employed full time	24
Employed part time	18
Not employed	17
White	20
Black	28
Metro central city	21
Metro suburbs	24
Non-metro	13
Metro 1,000,000+	26
Metro 250,000-999,999	19
Metro 50,000-249,999	19

The responses to these three questions on reasons for not subscribing are consistent with the results of an earlier NAB study of single copy buying in three cities. There too it was found that half of the non-subscribers had not been solicited for home delivery. This was more marked in the non-competitive markets, which suggested that lethargy accounted for the failure to conduct subscription drives. The findings in the present study--that soliciting is more likely to be conducted among those segments where newspaper subscribing is heavier--suggests further that those defined as less promising prospects and those who are less easily serviced are being neglected.

The single copy buyers interviewed in the three-city study included a sizeable proportion of frequent readers.[1] And many of them said they bought their papers instead of subscribing because of home delivery problems. A sizeable minority also said they would resume delivery service if it were improved. Thus both studies indicate that the frequent newspaper reader demands satisfactory service if he is to maintain a subscription.

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[1]The sample was drawn by intercepting single copy buyers at the time they were buying the paper, which increased the chance of selecting frequent buyers. See Single Copy Buying: A Three-City Study, Newspaper Readership Project, Newspaper Advertising Bureau, 1982.

SINGLE COPY BUYING

Yesterday Readers

Three-fourths (74%) of the yesterday readers had obtained their paper by subscription. 18% had bought the paper themselves, and the remaining 8% had obtained it in other ways--bought by others in the family, borrowed, found, etc. (table 17).

A small proportion (10%) of those who bought the paper they read yesterday also had home delivery. In most cases they presumably bought a paper which was not delivered. (In the previously-cited study of single copy buying in three cities it was found that among those who subscribe and also buy single copies, the majority buy a paper which is not delivered. But a sizeable minority of morning subscribers buy the same paper, either to leave the delivered copy at home for others in the family or because of delivery problems.)

The majority of non-subscribers who read a newspaper yesterday bought their own copy at a newsstand (28%) or other type of store (23%); only 12% bought the paper at a vending machine or rack. The remainder--apart from the 9% who have a copy delivered to their office--obtained their copy from someone else. That is, one-fifth borrowed a copy, read a copy brought home by someone else, or picked up a copy left behind by someone else.

Table 17

How Newspaper Read Yesterday Was Obtained
(Based on Yesterday Readers)

	Total	Have home Delivery	No home Delivery[a]
Home delivery	71%	96%	-%
Delivered to office or place of work	3	1	9
Bought at newsstand	8	1	28
Bought at other type of store	7	1	23
Bought at vending machine or rack	3	*	12
Other family member brought home	3	*	7
Borrowed copy from friend/co-worker	3	*	10
Picked up copy somebody else left behind	1	-	2
Some other way	1	*	7
D.K., N.A.	*	-	2
	100%	100%	100%

[a]Includes some who did not answer home delivery question.

Day of week: Table 18 shows that the proportion of non-subscribers among yesterday readers was lowest for Monday papers, and highest for Wednesday and Friday papers. Since the majority of non-subscribers who read yesterday had bought their own copies (63%), to which we might add the 7% who read a copy brought home--and presumably bought--by someone else in the family, this confirms what circulation people are aware

of--that street sales are highest on Fridays (with weekend entertainment news), and Wednesdays (usually best food day), and lowest on Mondays.

Table 18

Subscribers and Non-Subscribers Among Yesterday Readers by Day of Week Read

	Monday	Tuesday	Wednesday	Thursday	Friday
Subscribers	78%	74%	72%	76%	70%
Non-subscribers	22	26	28	24	30
	100%	100%	100%	100%	100%

Turning this table the other way, subscribers read a paper uniformly through the week, except for a small rise on Wednesday. But among non-subscribers there was considerably more variation in reading from day to day, with markedly less reading on Monday.

Table 19

Yesterday Readers Among Subscribers and Non-Subscribers, by Day of Week Read[a]

	Subscribers	Non-Subscribers
Mondays	83%	42%
Tuesdays	82%	58%
Wednesdays	85%	51%
Thursdays	84%	47%
Fridays	82%	54%

[a]Day of week refers to yesterday. Interviews were conducted Tuesday through Saturday to ascertain Monday through Friday yesterday readership. Thus Tuesday interviews identified Monday readers, etc.

AM or PM editions: Since afternoon daily subscriptions outnumber morning subscriptions[1] it is to be expected that subscribers were more likely to have read an afternoon paper yesterday. But non-subscribers were more prone to have read a morning paper.[2]

Table 20

Edition Read Yesterday by
Subscribers and Non-Subscribers

	Subscribers	Non-Subscribers
AM paper	39%	54%
PM paper	51	31
All day paper	10	15
	100%	100%

[1] See section on morning and afternoon home delivery, page 9.

[2] It may also be observed that this difference between subscribers and non-subscribers is consistent with the finding that frequent readers--more of whom are subscribers--are more likely to read an afternoon paper, and infrequent readers a morning paper:

	Frequent Readers	Infrequent Readers
Read AM paper yesterday	42%	49%
Read PM paper yesterday	46	43
Read All day paper	12	8
Base = yesterday readers	100%	100%

Availability of Single Copy Outlets

Nine out of ten adults say there are convenient places where they can buy single copies of a newspaper if they want to. This is not to say that it is highly convenient to do so, or that they can count on getting the paper they want when they reach the outlet, but most people can, if they wish, buy single copies. This is particularly true in large cities and in the Northeast, but even in other regions close to nine out of ten are aware of convenient places to buy single copies. This awareness is somewhat more characteristic of non-subscribers and younger people, perhaps because they are more mobile, or because they need to know where to buy a paper since they do not have home delivery.

Table 21

Percent Who Say There Are Convenient Places Where They Can Buy Single Copies

	%		%
TOTAL READERS	89	Northeast	93
		North Central	89
Yesterday readers	89	South	89
		West	86
Frequent readers	89		
Infrequent readers	91	18-24	95
		25-29	93
Subscribers	86	30-54	89
Non-subscribers	95	55-64	85
		65+	84
Metro central city	92		
Metro suburbs	89	$35,000 and over	87
Non-metro	87	$25,000-$34,999	93
		$15,000-$24,999	91
Metro 1,000,000+	93	$10,000-$14,999	92
Metro 250,000-999,999	89	Under $10,000	85
Metro 50,000-249,999	86		
		Employed	90
		Not employed	89

Who Buys Single Copies?

Although nine out of ten newspaper readers have convenient locations for buying single copies, only 39% ever do. These include 71% of the non-subscribers, but also 20% of those who have home delivery.

Table 22

Buyers of Single Copies

	Percent who ever buy[a]		Percent who ever buy[a]
TOTAL READERS	39		
Subscribers	20	Employed full time	44
Non-subscribers	71	Employed part time	37
		Not employed	34
Men	46		
Women	33	Metro 1,000,000+	48
		Metro 250,000-999,999	34
White	36	Metro 50,000-249,999	37
Black	67		
		Metro central city	50
18-24	45	Metro suburbs	36
25-29	51	Non-metro	31
30-34	45		
35-44	43	Northeast	53
45-54	31	North Central	32
55-64	33	South	35
65+	26	West	37
Married	34	Five years or more	37
Formerly married	39	Four years or less	46
Never married	54		

[a]Excludes those who said "hardly ever" or "never."

In general, of course more single copy buyers are found in those segments of the population in which home delivery is less prevalent. For example, there are more single copy buyers in the Northeast, in large metro areas, among blacks, central city residents, newcomers, singles and

adults under 45. However, there are also more single copy buyers among men than women and among full time employed adults. Since these groups are equally likely to have home delivery, it is clear that men, and employed adults, are more likely to buy a single copy to supplement the paper which is home-delivered.

Frequency of Single Copy Buying

In our earlier three-city study of single copy buying it was found that a large proportion of the non-subscribers who buy single copies do so every day. But that study was based on intercept interviews at newspaper sales points, to permit observing the actual purchase situation (i.e. where the purchase was made and what papers were available) and to ask about the respondent's destination and the purchase decision. Consequently, the infrequent newspaper buyers were under-represented since they were less likely to be encountered at a given time.

The present study permits us to examine the frequency of single copy buying in the population as a whole. Here we find that only one-fifth of those who buy single copies do so every day. Another 13% say they buy a paper almost every day and 21% buy a paper two, three or four times a week. But 26% buy only once a week and 19% do so less often (table 23).

Of course this varies from market to market and would also vary from paper to paper within a single market. Thus single copy buyers in larger metropolitan areas are the most frequent buyers: 27% buy a paper every day (including 3% who buy a paper twice a day). This is about twice the proportion of everyday buyers in smaller cities, where about half the single copy buyers do so only once a week or less often. And in non-metro areas 58% buy a paper only once a week or less often.

Table 23

Frequency of Single Copy Buying by Market Size and by Geographic Region
(Based on those who buy single copies)

	Total	Market Size				Geographic Region			
	%	Metro 1MM+ %	Metro 250M-999M %	Metro 50M-249M %	Non-Metro %	North East %	North Central %	South %	West %
Every day	21	27	14	16	14	36	16	12	9
Almost every day	13	19	6	12	5	21	11	5	13
2-4 times a week	21	17	29	17	23	14	24	25	25
Once a week	26	20	28	28	37	18	34	30	26
Buy, but less often	19	16	23	25	21	11	15	28	27
Base = total single copy buyers	39%	48%	34%	37%	31%	53%	32%	35%	37%

In regional terms, single copy buyers in the Northeast are the most frequent buyers: 36% buy a paper every day and an additional 21% buy one almost every day. Once-a-week buying--probably best food day--is heaviest in North Central states (34%). And in the South and West there is a larger proportion than elsewhere of less than once-a-week single copy buying.

Subscribers who also buy individual copies (of the same paper or of other papers) do so less often than non-subscribers, but a majority of them buy a copy at least once a week. (The three-city study also found that subscribers buy single copies less often than non-subscribers do, although the percentage levels are different because of the study design.)

Table 24

Frequency of Single Copy Buying Among Subscribers and Non-Subscribers
(Based on those who buy single copies)

	1982 National Study		1981 Three-City Study[a]	
	Non-Subscribers	Subscribers	Non-Subscribers	Subscribers
	%	%	%	%
Twice a day	2	1	6	2
Every day	20	13	61	39
Almost every day	16	7	14	12
Four times a week	6	3	6	6
Three times a week	8	5	5	10
Twice a week	10	8	5	9
Once a week	23	33	3	6
Buy, but less often	15	30	-	7
No answer	-	-	-	9
	100%	100%	100%	100%

Base = single copy buyers

[a]See Single Copy Buying: A Three-City Study, Newspaper Readership Project, Newspaper Advertising Bureau, 1982.

Frequency of Single Copy Buying by Background Characteristics

Table 25 shows the frequency of single copy buying according to the background characteristics of the purchasers. In general, the patterns of buying are similar, but some differences do emerge:

--Blacks, who are far more likely than whites to be single copy buyers, also buy them more frequently: 51% of the 67% who buy their papers do so every day or almost every day. Only 30% of the white single copy buyers buy a paper that often.

--Men, who are more likely than women to buy a paper, also buy papers somewhat more often than women: whereas nearly three out of five (58%) buy a paper more often than once a week, only half the women (49%) do so.

--Although full-time employed adults are most likely to "ever buy" single copies, they differ from the part-time and not-employed buyers only in buying at least once a week. This suggests that they are more engaged by a particular section or feature.[1]

--High income buyers ($25,000 and over) are expectably more regular in their buying habits, whereas low income people are inclined to skip a day occasionally.

--Educational level has less bearing on single copy buying: at each level two out of five do buy papers and similar proportions buy copies twice a week or more often.

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[1]The three-city study revealed that much single copy buying is habitual. People usually buy the same paper every day or they buy it on particular days when certain sections or features are published.

--The tabulation by age, where the bases of single copy buyers are relatively small, suggests that the youngest buyers are least likely to buy a paper every day. The smallest proportion of single copy buyers is found among adults over 65, but this group is most committed to buying every day or almost every day, if they buy papers at all.

Table 25

Frequency of Single Copy Buying
by Background Characteristics

	Every day	Almost every day	2-4 times a week	Once a week	Less Often	Base = Total who ever buy[a]
TOTAL	21	13	21	26	19	39%
Men	22	14	22	24	18	46%
Women	18	11	20	29	22	33%
White	20	10	22	28	20	36%
Black	25	26	18	15	15	67%
18-24	12	14	24	29	21	45%
25-29	20	14	21	29	16	51%
30-34	24	16	19	29	12	45%
35-44	17	10	31	24	18	43%
45-54	29	8	17	23	26	31%
55-64	18	17	14	23	28	33%
65+	30	14	16	22	18	26%
College grad.	20	12	17	32	19	41%
Some college	21	11	21	31	16	39%
H.S. grad.	20	15	21	26	18	39%
Less than h.s. grad.	18	13	25	16	28	39%
$35,000 and over	23	5	21	28	23	37%
$25,000-$34,999	24	11	20	30	15	40%
$15,000-$24,999	14	16	24	27	19	39%
$10,000-$14,999	14	14	24	23	25	46%
Under $10,000	14	20	21	27	18	39%
Employed full time	20	11	20	31	17	44%
Employed part time	23	9	22	19	27	37%
Not employed	19	16	21	23	21	34%

[a]Excludes those who never or hardly ever buy single copies.

Taking Home Bought Copies

In the three-city study, eight out of ten of the single copy buyers said they usually took their bought papers home. The present national study confirms that finding: 84% of all single copy buyers said they usually take home the papers they buy.

Table 26

How Often Bought Papers are Taken Home
(Based on those who buy single copies)

Most of the time	84%
Sometimes	7
Rarely or never	7
No answer	2

Base = 39% who buy single copies

This practice is common to all who buy single copies. The figure is only slightly lower for subscribers (78%), high income people (76%) and full-time employed (77%) for whom the bought paper is, or is more likely to be, a second paper (table 27).

Table 27

Percent Who Take Home Bought Paper Most of the Time
(Based on those who ever buy single copies)

	%		%
TOTAL	84	Employed full time	77
		Employed part time	88
Subscribers	78	Not employed	91
Non-subscribers	87		
		Men	81
Frequent readers	83	Women	88
Infrequent readers	85		
		Married	81
18-24	86	Formerly married	92
25-29	79	Never married	84
30-34	85		
35-44	78	White	85
45-54	80	Black	80
55-64	93		
65+	91	Metro 1,000,000+	82
		Metro 250,000-999,999	85
$35,000 and over	76	Metro 50,000-249,999	82
$25,000-$34,999	77		
$15,000-$24,999	83	Metro central city	84
$10,000-$14,999	93	Metro suburbs	81
Under $10,000	33	Non-metro	89
College grad.	74	Northeast	82
Some college	82	North Central	87
H.S. grad.	85	South	87
Less than h.s. grad.	91	West	78

Preferred Type of Newspaper Outlet

When asked whether they would prefer to buy a newspaper from a coin-operated rack or machine, or from a store or newsstand, 32% said it made no difference. But the remainder expressed an overwhelming preference for over-the-counter purchases: 49% chose store or newsstand and only 19% opted for a rack or vending machine.

In the Northeast--where single copy buying is most heavily concentrated--only 8% prefer the automated purchase; 62% prefer stores or newsstands. In part this may be due to the fact that newsstand and store outlets still prevail in that region. But it is also true that stores and newsstands, in addition to permitting other purchases and providing human contact, facilitate a newspaper purchase because they present no mechanical difficulty and because they provide better newspaper service and more choices.[1]

It is no surprise then that they are more heavily preferred by frequent readers than by infrequent readers, and, as shown earlier (table 17), that the single copy buyers among yesterday readers are five times more likely to buy their copy over a counter than from a rack or machine.

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[1] In the three-city study, the prime advantage single copy buyers attributed to boxes or machines was the speed of purchase. Among the advantages seen in buying a paper at a newsstand or store were that they always had a paper, that the paper was complete and undamaged, and one didn't have to worry about having exact change.

They also said they liked the human contact in buying a paper at a store or newsstand. It is a reasonable inference that the human contact of the counter purchase, in providing the pleasant experience of being recognized and greeted, also leads people to buy a paper regularly. That is, it creates a tie with the vendor that the buyer may be reluctant to break.

Table 28

Preferred Type of Outlet for Buying Paper
by Background Characteristics of Readers

	Rack/Vending Machine	Store or Newsstand	Makes no Difference	No Answer
TOTAL	19%	49%	32%	*%
Frequent readers	17	51	32	*
Infrequent readers	22	45	32	1
Subscribers	18	47	34	1
Non-subscribers	20	52	28	*
Men	21	48	31	*
Women	17	50	33	*
18-24	21	50	29	-
25-29	24	42	34	*
30-34	19	51	30	-
35-44	19	54	27	*
45-54	16	48	35	1
55-64	16	46	36	2
65+	16	50	33	1
College grad.	16	54	30	*
Some college	21	48	30	1
H.S. grad.	20	48	32	*
Less than h.s. grad.	15	48	36	1
White	19	50	31	*
Black	16	42	42	-
Employed	21	51	28	*
Not employed	16	47	37	*
Metro central city	23	49	28	*
Metro suburbs	16	51	33	*
Non-metro	18	46	35	1
Northeast	8	62	30	*
North Central	18	51	30	1
South	23	40	37	*
West	25	45	29	1
$35,000 and over	17	51	31	1
$25,000-$34,999	19	51	30	*
$15,000-$24,999	21	48	31	*
$10,000-$14,999	25	42	32	1
Under $10,000	17	50	32	1
5 years or more	17	49	33	1
4 years or less	26	48	26	-

*Less than 0.5%.

Finally, the preference for stores or newsstands holds true for infrequent as well as frequent single copy buyers. Whether they buy a paper every day, once a week, or never, a sizeable proportion expressed no preference, but stores or newsstands were the prevailing choice over racks or machines.

Table 29

Preferred Type of Outlet by Frequency of Single Copy Buying

	Prefer Rack or Machine %	Prefer Store or Newsstand %	Makes no Difference, n.a. %
By Frequency			
Every day	19	54	27
Almost every day	19	45	36
2, 3, 4 times a week	22	54	24
Once a week	23	53	24
Less often	17	48	35
Never	18	47	35

SUMMARY AND IMPLICATIONS

Home delivery, which is the cornerstone of regular newspaper reading, shows some slippage--more for daily than Sunday home delivery. This may reflect some decline of interest in reading daily newspapers, but it is also due to failure to provide satisfactory service. Although subscribers express a high degree of satisfaction with their home delivery service, dedicated readers who have dropped their subscriptions have done so primarily because of service problems. Obviously this calls for unremitting attention by newspapers to the quality of home delivery service, especially in the face of urban changes (and the shift to suburbs) which exacerbate service problems.

Subscribers are equally satisfied with adult and juvenile carriers, which should be reassuring to newspapers that are shifting to adult carriers. But subscribers to morning papers are not always familiar with the carrier who delivers the early paper. A shift to publishing a morning paper could therefore be accompanied by a loosening of personal ties with the carrier.

Only 54% of the non-subscribers say they have been asked to subscribe at their present address. Although this may under-represent the number of non-subscriber households that have in fact been contacted, clearly a large proportion has been neglected. These tend to be the people who are more difficult to serve or less likely to subscribe. While it may be an efficient marketing strategy to focus on likely prospects, neglecting the

less likely prospects may contribute to a growing number of people with less commitment to daily newspaper reading because they have never had home delivery of a daily newspaper.

Single copy buying is the frequent reader's answer to unsatisfactory home delivery and the infrequent reader's answer to being less interested in newspaper reading (or a way of cutting costs on what is less essential to him). Although single copy buying does not encourage daily readership to the same degree that home delivery does, single copy sales do account for a large and growing proportion of circulation. But the trend to providing vending machines or racks instead of retail outlets does not entice the single copy buyer. Frequent readers as well as infrequent readers much prefer stores or newsstands, where there is personal contact, more choice, and better newspaper service. These findings suggest that single copy sales can be encouraged by retaining retail outlets or obtaining new ones, and by continuing to improve the service aspect and appeal of machines and racks. Such steps may become increasingly important because of the growing number of households in which the single head or both adults work, which complicates the delivery of papers to their homes, or reduces their interest in getting it there rather than en route to work or at work.

APPENDIX

TABLES OF BASES FOR QUESTIONNAIRE DATA

Table A-1. All Sampled Adults: Weighted and Unweighted

Table A-2. All Newspaper Readers, Qualified Yesterday Readers and Yesterday Nonreaders (Unweighted)*

Table A-3. All Newspaper Readers, Qualified Yesterday Readers and Yesterday Nonreaders (Weighted)*

Note

* Qualified Yesterday Readers read a daily paper "yesterday" and were taken through sampled pages of that paper during the interview. They comprise the base of respondents for data on page openings and readership of specific items of editorial and advertising content.

Yesterday Nonreaders are newspaper readers who did not read a daily paper "yesterday." (Included in this category is a small proportion of readers of a daily yesterday whose paper was not available for use in the interview.) They comprise the base of respondents who were taken through sampled pages of the paper they usually read and asked about their interest in specific items of editorial and advertising content.

Further details on sampling, weighting, and tabulation of questionnaire data are contained in "The Daily Newspaper: Readership and Content" (May 1983), a report on methodology prepared by Audits & Surveys, Inc.

Table A-1

Bases for All Sampled Adults

Group	Unweighted Number	Weighted Number (000's)
All Respondents	1,979	163,867
Age:		
18 - 24	269	29,132
25 - 29	223	20,624
30 - 34	227	17,658
35 - 44	351	26,769
45 - 54	273	22,128
55 - 64	277	20,250
65 +	345	26,388
Education:		
Not HS Graduate	456	37,019
HS Graduate	765	63,229
Some College	408	35,640
College Graduate +	334	26,638
Income:		
Under $10,000	295	27,833
$10,000-$14,999	232	20,062
$15,000-$24,999	415	33,705
$25,000-$34,999	359	28,954
$35,000 +	300	23,180
Employment Status:		
Total Employed	1,032	86,414
Full Time	824	69,897
Part Time	208	16,517
Total Not Employed	940	76,795
Homemakers	374	28,896
Sex:		
Male	932	77,718
Female	1,047	86,149
Race:		
White	1,749	142,574
Black	180	16,935
Region:		
Northeast	461	35,946
North Central	547	41,929
South	608	54,247
West	363	31,745

Table A-1 (Continued)

Group	Unweighted Number	Weighted Number (000's)
Residence Size:		
Metro - 1 MM +	797	66,028
250 - 99,999 M	401	32,495
50 - 249,999 M	275	21,962
Non-metro area	506	43,382
Within Metro Area:		
Central City	579	50,307
Suburb	894	70,178
Cable Households:		
Have Cable TV	713	58,613
Any Children:		
Yes	878	70,833
No	1,101	93,034
Reading Frequency:		
Frequent Reader (4-5 days)	1,275	101,576
Infrequent Reader	528	45,549
Home Delivery:		
Delivery of Any Daily	1,203	92,786
AM Delivery	565	44,699
PM Delivery	619	46,850
No Daily Delivered	776	71,084
Marital Status:		
Married	1,392	101,900
Divorced/widowed/separated	298	29,426
Single (never married)	284	31,993
Years at Location:		
5 or more	1,597	128,407
4 or less	377	35,043

Table A-2

Bases for All Newspaper Readers - Unweighted

Group	Total Readers	Qualified Readers	Yesterday Non-readers
All Respondents	1,803	1,288	515
Age:			
18 - 24	238	132	106
25 - 29	196	115	81
30 - 34	208	140	68
35 - 44	331	222	109
45 - 54	249	197	52
55 - 64	258	209	49
65 +	310	260	50
Education:			
Not HS Graduate	375	267	108
HS Graduate	707	485	222
Some College	383	259	124
College Graduate +	323	262	61
Income:			
Under $10,000	245	158	87
$10,000-$14,999	211	150	61
$15,000-$24,999	375	256	119
$25,000-$34,999	340	257	83
$35,000 +	291	221	70
Employment Status:			
Total Employed	943	647	296
Full Time	750	517	233
Part Time	193	130	63
Total Not Employed	853	634	219
Homemakers	342	229	113
Sex:			
Male	837	629	208
Female	966	659	307
Race:			
White	1,615	1,172	443
Black	151	99	52
Region:			
Northeast	435	341	94
North Central	506	333	173
South	550	401	149
West	312	213	99

Table A-2 (Continued)

Group	Total Readers	Qualified Readers	Yesterday Non-readers
Residence Size:			
Metro - 1 MM +	702	503	199
250 - 99,999 M	374	277	97
50 - 249,999 M	262	185	77
Non-metro area	465	323	142
Within Metro Area:			
Central City	536	381	155
Suburb	802	584	218
Cable Households:			
Have Cable TV	667	472	195
Any Children:			
Yes	802	524	278
No	1,001	764	237
Reading Frequency:			
Frequent Reader (4-5 days)	1,275	1,151	124
Infrequent Reader	528	137	391
Home Delivery:			
Delivery of Any Daily	1,203	989	214
AM Delivery	565	469	96
PM Delivery	619	507	112
No Daily Delivered	600	299	301
Marital Status:			
Married	1,293	942	351
Divorced/widowed/separated	253	184	69
Single (never married)	252	157	95
Years at Location:			
5 or more	1,468	1,089	379
4 or less	331	196	135

Table A-3

Bases for All Newspaper Readers - Weighted (in 000's)

Group	Total Readers	Qualified Readers	Yesterday Non-readers
All Respondents	147,125	104,371	42,754
Age:			
18 - 24	25,261	14,886	10,375
25 - 29	18,096	10,825	7,271
30 - 34	15,951	11,143	4,808
35 - 44	24,881	16,510	8,371
45 - 54	19,766	15,792	3,974
55 - 64	18,833	14,904	3,929
65 +	23,471	19,445	4,026
Education:			
Not HS Graduate	30,017	20,750	9,267
HS Graduate	57,373	29,849	17,524
Some College	33,105	22,212	10,893
College Graduate +	25,341	20,271	5,070
Income:			
Under $10,000	22,940	13,838	9,102
$10,000-$14,999	17,723	12,469	5,254
$15,000-$24,999	30,422	20,921	9,501
$25,000-$34,999	27,315	20,676	6,639
$35,000 +	22,402	17,070	5,332
Employment Status:			
Total Employed	77,603	53,109	24,494
Full Time	62,543	43,221	19,322
Part Time	15,060	9,888	5,172
Total Not Employed	68,864	50,604	18,260
Homemakers	25,975	17,244	8,731
Sex:			
Male	68,531	50,586	17,945
Female	78,594	53,785	24,809
Race:			
White	130,161	93,287	36,874
Black	13,675	9,408	4,267
Region:			
Northeast	33,801	27,079	6,722
North Central	38,567	25,031	13,536
South	48,061	34,732	13,329
West	26,696	17,529	9,167

Table A-3 (Continued)

Group	Total Readers	Qualified Readers	Yesterday Non-readers
Residence Size:			
Metro - 1 MM +	56,809	40,960	15,849
250 - 99,999 M	30,212	22,487	7,725
50 - 249,999 M	20,531	13,949	6,582
Non-metro area	39,573	26,975	12,598
Within Metro Area:			
Central City	45,580	31,864	13,716
Suburb	61,972	45,532	16,440
Cable Households:			
Have Cable TV	54,014	38,152	15,862
Any Children:			
Yes	63,546	42,009	21,537
No	83,579	62,362	21,217
Reading Frequency:			
Frequent Reader (4-5 days)	101,576	91,996	9,580
Infrequent Reader	45,549	12,375	33,174
Home Delivery:			
Delivery of Any Daily	92,786	77,041	15,745
AM Delivery	44,699	36,989	7,710
PM Delivery	46,850	39,243	7,607
No Daily Delivered	54,339	27,330	27,009
Marital Status:			
Married	93,296	67,696	25,600
Divorced/widowed/separated	25,486	18,071	7,415
Single (never married)	27,795	18,056	9,739
Years at Location:			
5 or more	116,353	86,679	29,674
4 or less	30,407	17,509	12,898

METHODOLOGICAL NOTE

The following tables are provided for readers interested in obtaining a quick estimate of the stability of a given percentage or of the significance of the difference between two percentages.

Confidence Intervals for a Given Percentage
(at the 95% confidence level)

	Reported Percentage				
(Base for %)	10 or 90%	20 or 80%	30 or 70%	40 or 60%	50%
500	2.6	3.5	4.0	4.3	4.4
250	3.7	5.0	5.7	6.1	6.2
200	4.2	5.5	6.3	6.8	6.9
150	4.8	6.4	7.3	7.8	8.0
100	5.9	7.8	9.0	9.6	9.8
50	8.3	11.1	12.7	13.6	13.9
25	11.8	15.7	18.0	19.2	19.6

Example: If a report shows that 20% of all sampled respondents (when N = 500) answer in a particular way the chances are about 95 out of 100 that the true value lies within ± 3.5% of that value, that is, that the range 16.5% - 23.5% contains the true value in the population.

Significance of Differences Between Percentages
(95% confidence level)

	Average of Reported Percentages				
Average of the Bases of Percentages Being Compared	10 or 90%	20 or 80%	30 or 70%	40 or 60%	50%
500	3.7	4.9	5.7	6.1	6.2
250	5.2	7.1	8.1	8.6	8.8
200	5.9	7.8	8.9	9.6	9.8
150	6.8	9.1	10.3	11.0	11.3
100	8.3	11.0	12.7	13.6	13.9
50	11.7	15.7	18.0	19.2	19.7
25	16.7	22.2	25.5	27.2	27.7

Example: A report shows that 33% of all respondents 30 to 39 years of age use a certain product and that only 27% of all respondents in the 40 to 49 age group use that product. Could this difference be due to chance?

In this example assume a base of 500 for both age groups. The average of the percentages (33% + 27%) equals 30% and the difference between the percentages is 6%. Since 6% is greater than 5.7% (the figure in the table for this base and percentage) the chances are about 95 out of 100 that the product is used significantly more by the 30-39 age group.

These table values are based on an assumption of simple random sampling. The figures may be too large if a stratified sampling technique was used and probably are too small if a cluster sampling technique was utilized. (For formulas used, see Q. McNemar, Psychological Statistics, pages 54, 60.) The second table should be used with extreme caution if the bases being averaged are very different in size.